

51856 0830

MOBIL OIL CORPORATION  
R. J. REYNOLDS TOBACCO COMPANY  
PREPARED BY BILL ROTH  
AUGUST 23, 1993

*RJ Reynolds*  
Tobacco Company

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**Mobil Oil Corporation**

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# **CIGARETTE BUSINESS OVERVIEW**

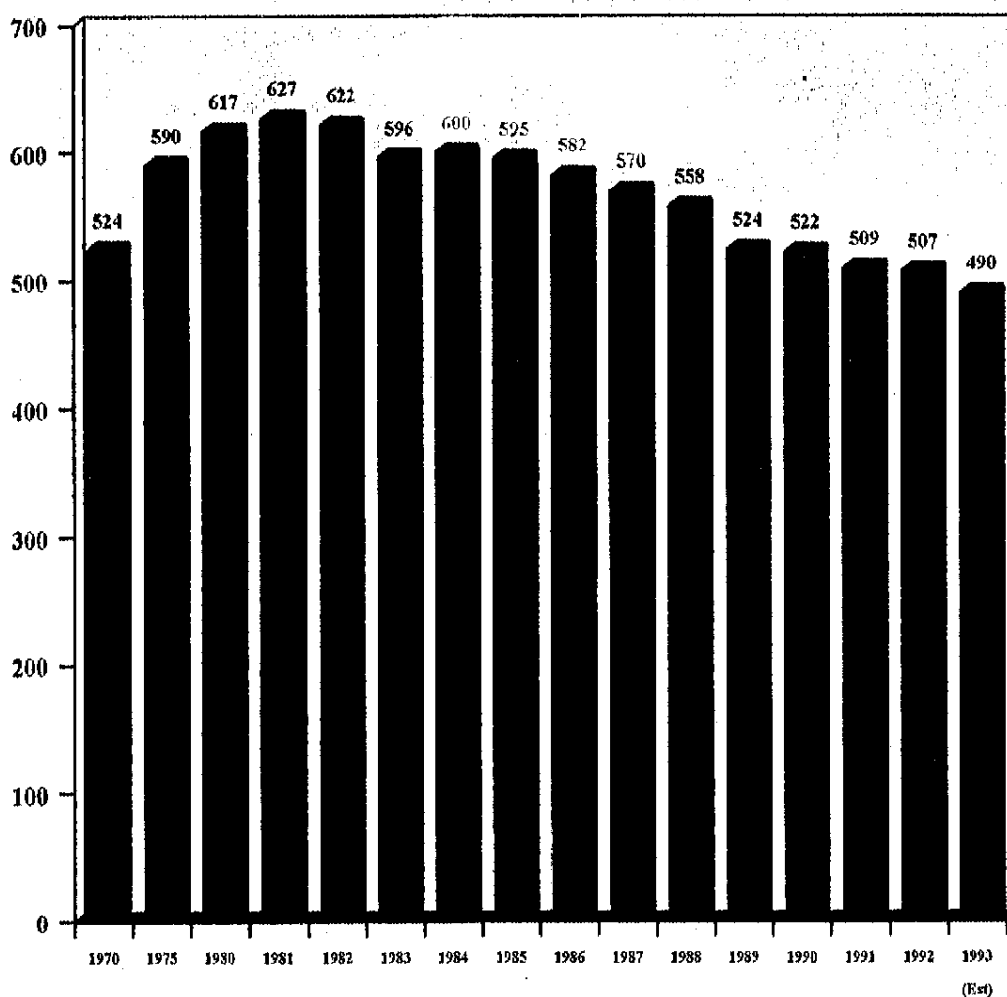
**Presented By:**

*RJ Reynolds*  
Tobacco Company

# TOTAL U.S. CIGARETTE INDUSTRY VOLUME

## Billions of Cigarettes

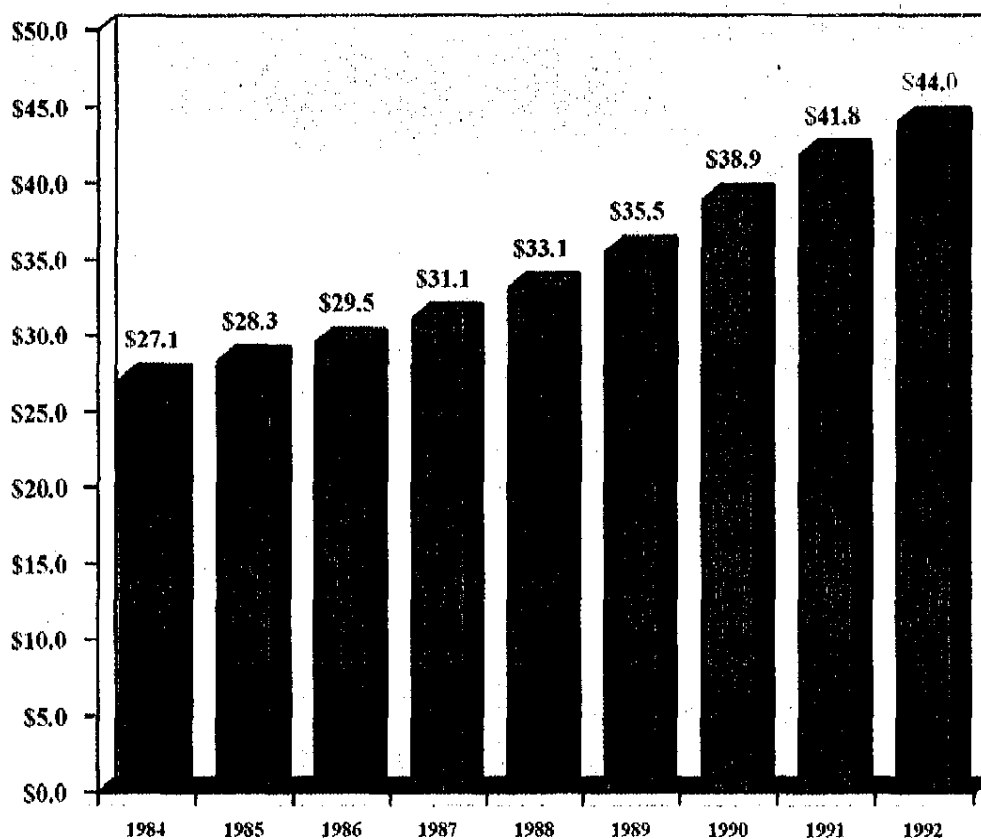
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# CIGARETTE RETAIL DOLLAR SALES

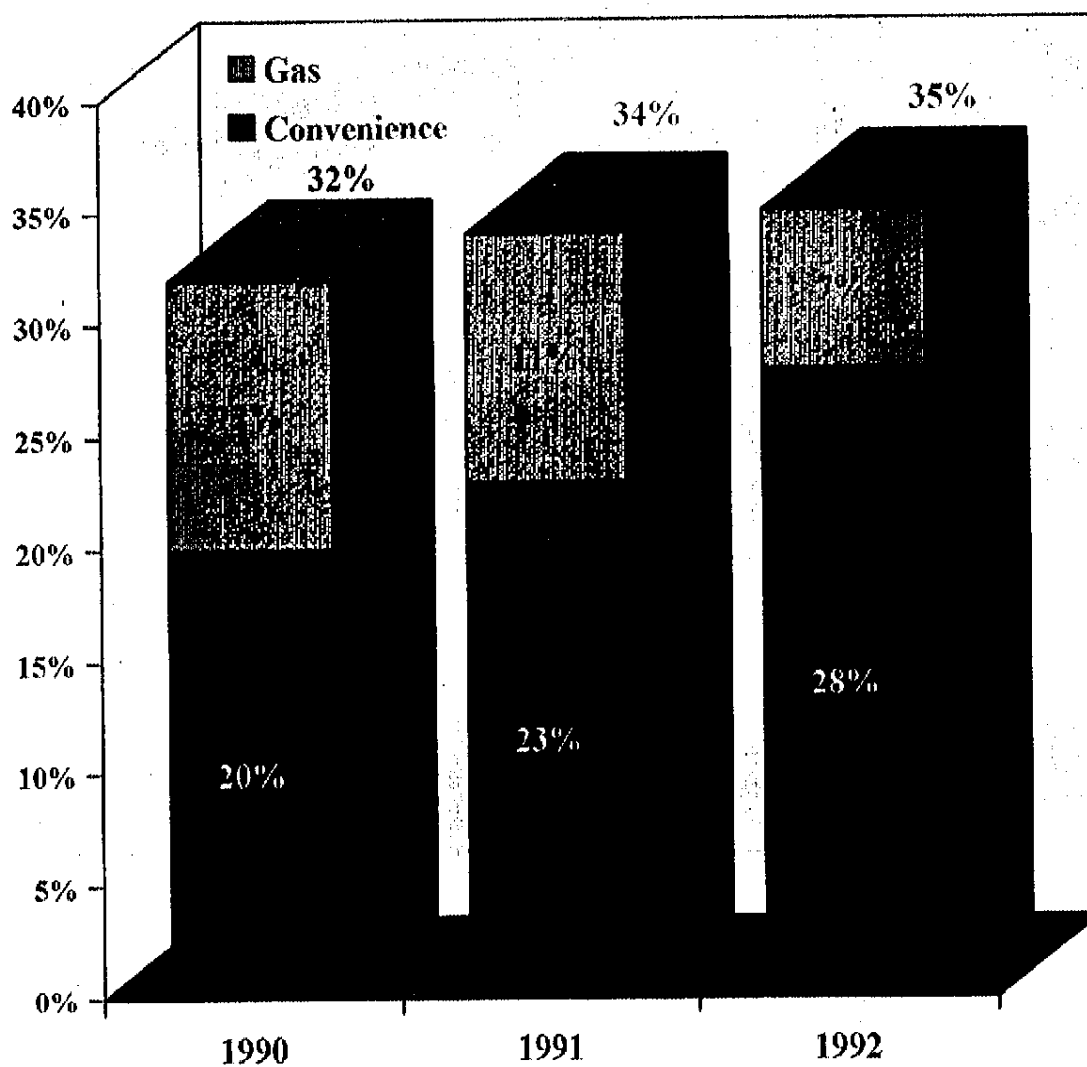
## Billions of Dollars



- Total estimated retail dollar sales for the cigarette industry reached \$44 billion in 1992, up 5.3% versus year-ago.

## CONVENIENCE & GAS STORES

### Share of Cigarette Industry Volume

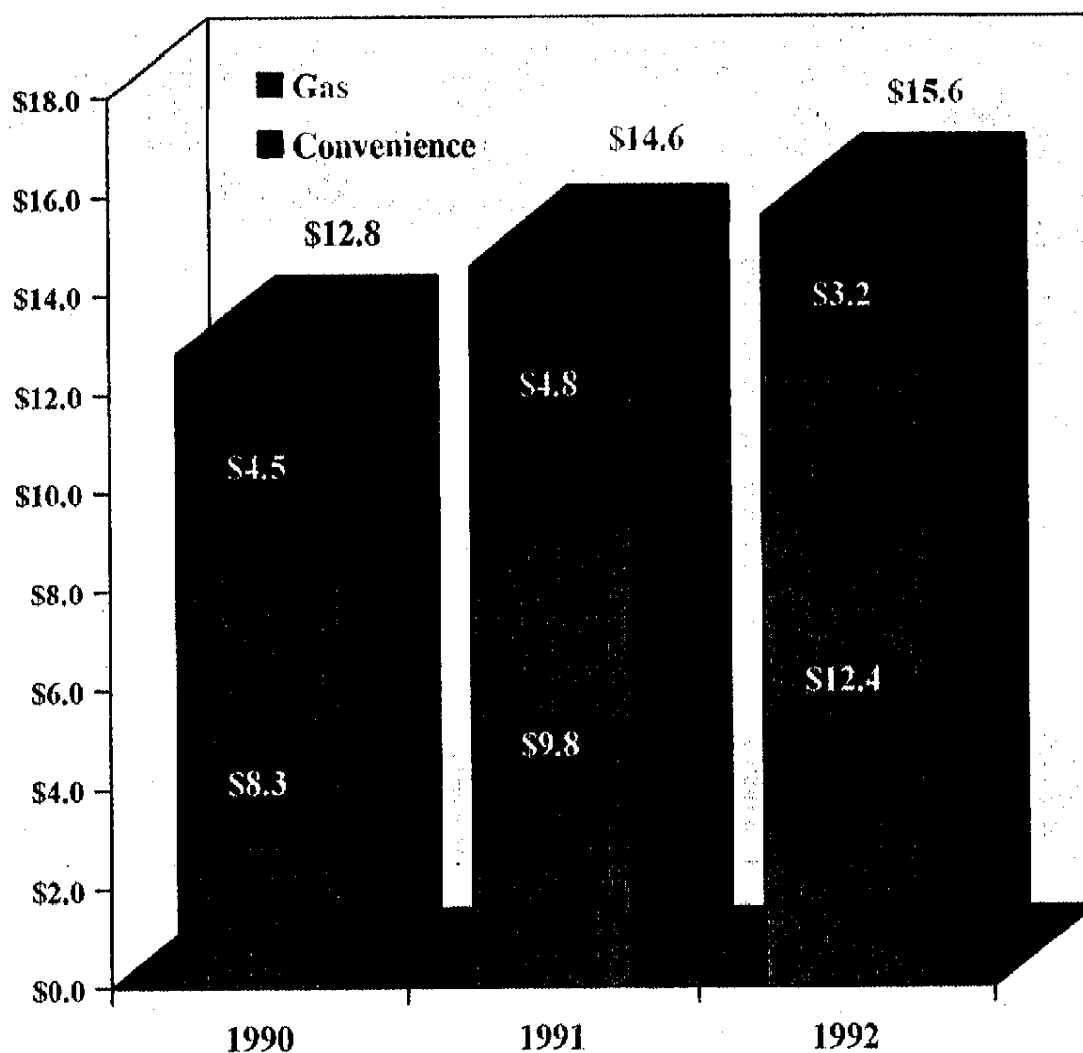


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# CONVENIENCE & GAS STORES

## Cigarette Retail Dollar Sales

Billions of Dollars



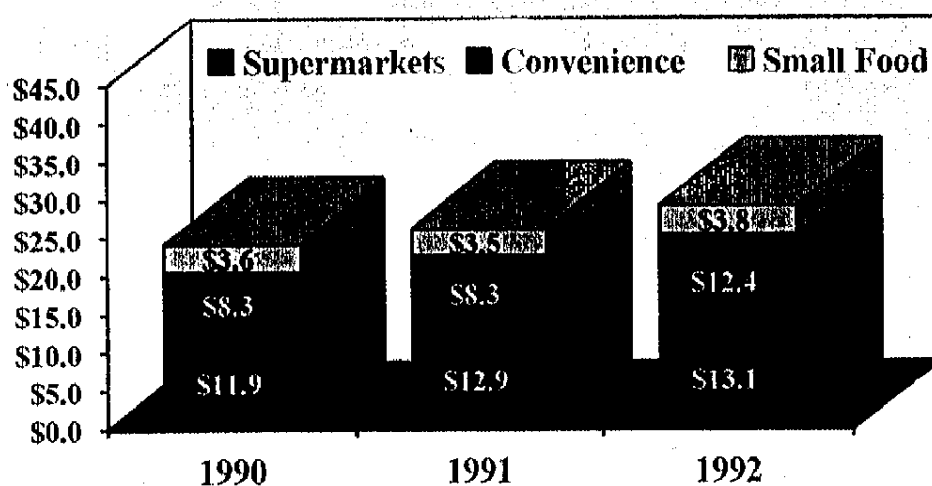
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# TOTAL U.S. CIGARETTE RETAIL DOLLAR SALES

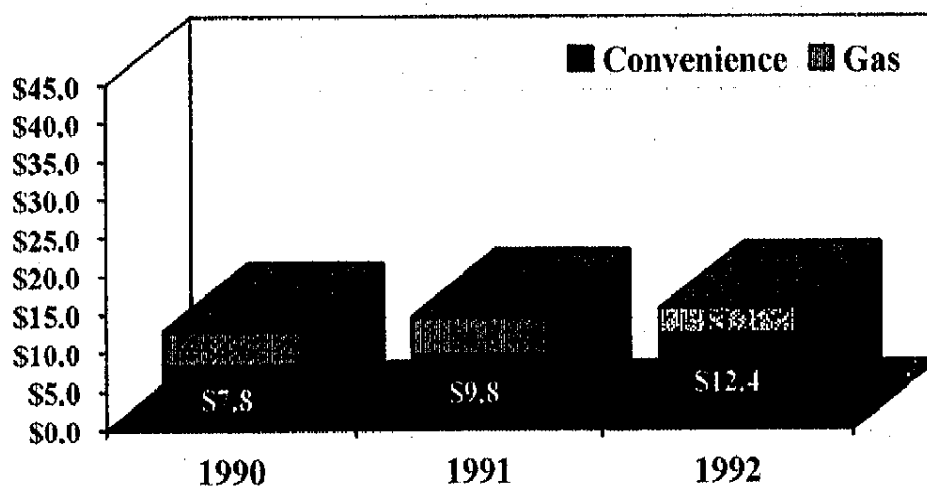
## Billions of Dollars

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### TOTAL FOOD



### CONVENIENCE / GAS



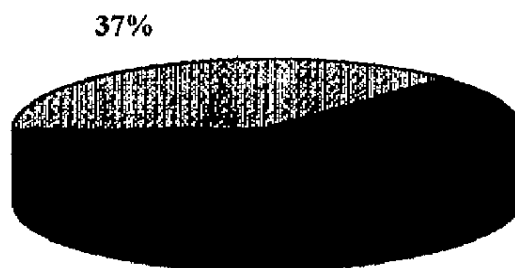
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## PROFILE OF CONVENIENCE / GAS CIGARETTE PURCHASERS



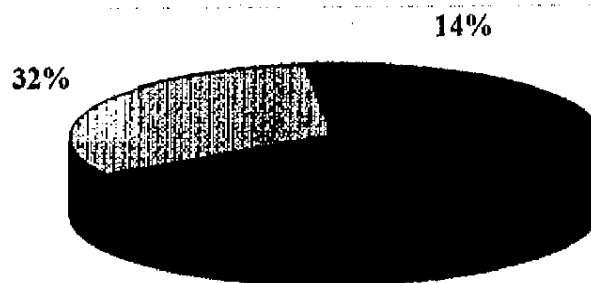
Sex



63%

■ Male ■ Female

Age



14%

54%

■ 18-34 years ■ 35-49 years ■ 50+ years

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## CONVENIENCE / GAS STORE FACTS

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- Annual Convenience / Gas store cigarette sales are \$15.6 billion.
- Share of cigarettes sold by Convenience / Gas outlets is 35%, making it the leading retail outlet for cigarettes.
- Cigarettes account for 19% (excluding gas sales) of total Convenience / Gas store all commodity volume.
- The average Convenience / Gas store sells approximately 152 cartons of cigarettes per week.
- 76% of the volume that moves through Convenience / Gas stores is in packs, 24% in cartons.
- Convenience / Gas stores cigarette gross margins are the highest of any retail outlet.
- Convenience / Gas stores are highly developed among adult male smoker under 35 years, pack purchasers, box purchasers, 85mm smokers, and full flavor smokers.

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Cigarette Profitability

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Convenience Stores

**MOBIL OIL CORPORATION**

# Cigarette Profitability

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## Proper Space Management

*Proper  
Space  
Management*

**Profits**

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## **Space Management . . .**

### **Are You Properly Merchandising?**

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- *Top Selling Brands of all segments require proper display space:*
  - Primary emphasis on Full Price Brands
  - Secondary emphasis on Mid-Price Brands
  - Black & White / Private Label Cigarettes need the least prominent positioning
- *Lower Turns and Lower ROI:*
  - A result of increased inventory of brands that do not sell and too many SKU's of lower priced brands
  - NOT a result of displays and inventory of the major brands in each segment

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**Space Management . . .**  
**Are You Positioned to Display the**  
**Most Prominent Brands ?**

---

**Top Ranked Full Price Brands**

Marlboro  
WINSTON  
CAMEL  
SALEM  
Newport  
Kool

**Top Growth Full Price Brands**

CAMEL  
Newport

- WINSTON - #2 Brand
- CAMEL - #1 Growth Brand
- SALEM - #1 Menthol Brand

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**Space Management . . .**  
**Are You Positioned to Display the**  
**Most Prominent Brands ?**

---

*Top Ranked Mid-Price Brands*

DORAL  
Montclair  
Cambridge  
Bristol  
Raleigh Ex

*Top Growth Mid-Price Brands*

STERLING  
Misty  
MAGNA

- **DORAL - #1 Brand**
- **STERLING - #1 Growth Brand**

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**Space Management . . .**

**Store Specific Industry**

**Planogramming**

**Insures Your Profitability !**

**RJRPL**

Bristol  
Cambridge

Magna  
Sterling

Doral

Raleigh TX  
Misty

Cash  
Register

Kool

Marlboro

Camel  
Promo's

TRAFFIC FLOW

Store Name  
&  
Address

PCD

SAVINGS

B/W PL

PROMOTION

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## **Actions Necessary to Insure . . . The Benefits of Proper Space Management**

---

- ***Actions***

- **Prominently Display the Leading Brands in Each Segment**
- **Manage the Number of Displays**

- ***Benefits***

- **Increased Profitability**
- **Reduced Shrink**
- **Increased Inventory Performance**
- **Reduced Clutter**

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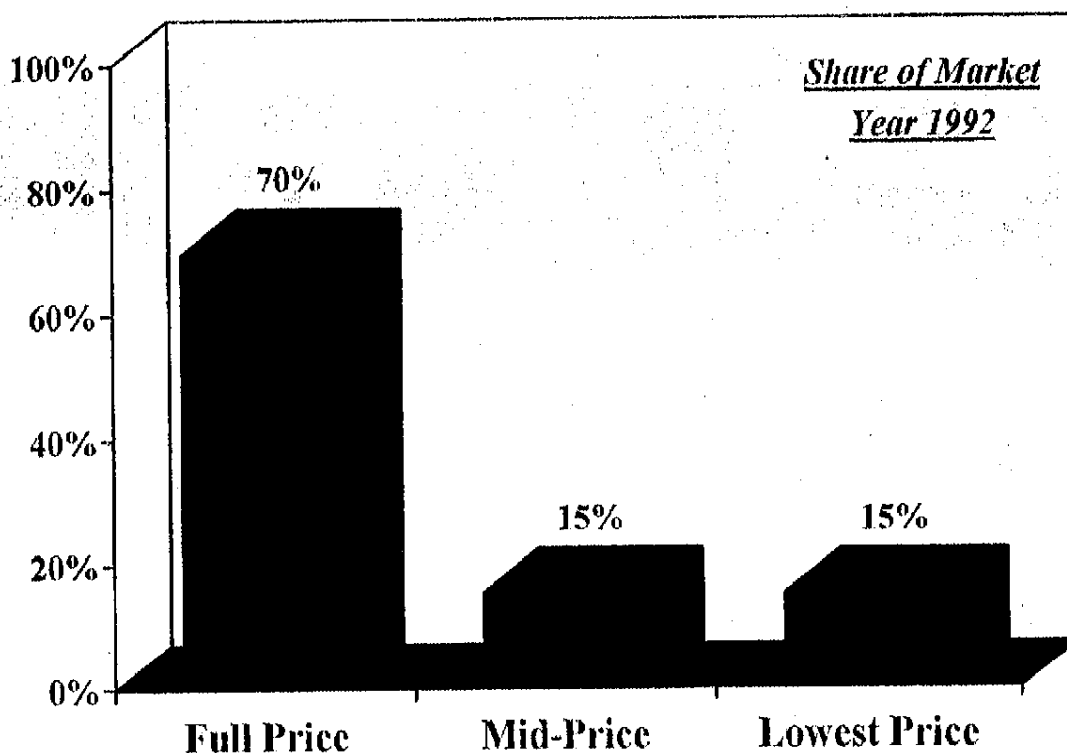
## Proper Product Management



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## Product Management . . . What do Your Customers Want ?



- *Full Price Brands*
  - Your Most Important Segment
- *Mid-Price Brands*
  - Major Player in Your Business
- *Lowest Price Brands*
  - Must Satisfy these Customers



## **Product Management . . . What do Your Customers Want ?**

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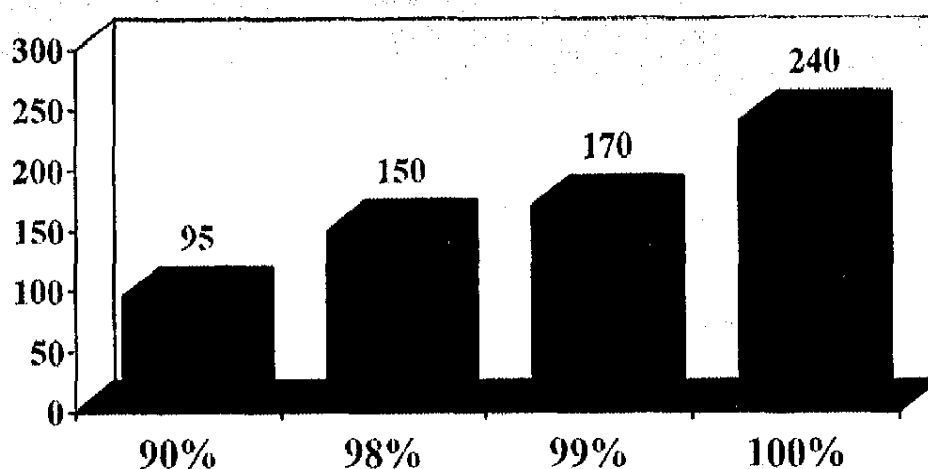
- *RJR Brands are well positioned with Your Customers*
- *4 of the Top 5 National Brands are RJR Brands*
  - #1 Marlboro
  - #2 WINSTON
  - #3 SALEM
  - #4 DORAL
  - #5 CAMEL
- *CAMEL is the #1 Full Price Growth Brand*
- *SALEM is the #1 Menthol Full Price Brand*
- *DORAL is the #1 Mid-Price Brand*

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## Product Management ... Full Price Brands - The Most Profitable

Number of Brand Styles to Satisfy ...



- Manage the number of styles without losing a significant amount of sales.
- 150 Full Price Brand Styles will satisfy 98% of your customers.

Should Include:

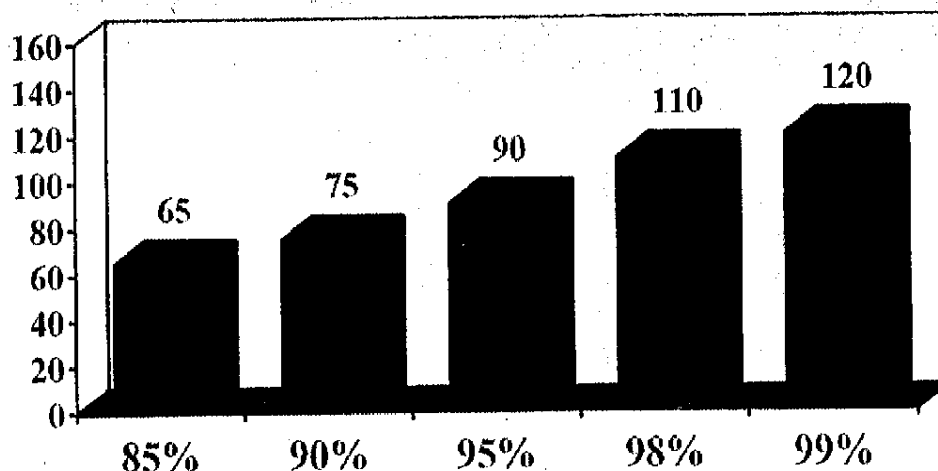
- *Your Top Selling Styles*
- *Your Top Growth Styles*

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## Product Management ... Mid-Price Brands

Number of Brand Styles to Satisfy ...



- Manage the number of styles without losing a significant amount of sales.
- 90 Mid-Price Brand Styles will satisfy 95% of your customers.  
Should Include:

- *Your Top Selling Styles*
- *Your Top Growth Styles*

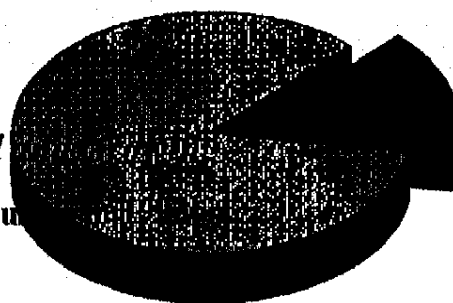
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## Product Management . . . Lowest Price Brands

- ***The Category is Established***
  - 15% of total cigarette industry
  - Up about 12% from 1990
- ***A Potentially Profitable Segment***
  - Must implement proper pricing strategies
  - Must display properly
  - Must implement pricing POS
- ***Limit Brands***
  - Reduces price confusion and clutter
  - Reduces Inventory - Increases Turns
- ***RJR Private Label Program - The Most Profitable***



Lowest  
Price  
15%

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## **Actions Necessary to Insure . . . The Benefits of Proper Product Management**

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- ***Actions***

- **Manage Overall Inventory Levels in Proportion to Your Sales**
- **Offer Limited Black & White / Private Label**

- ***Benefits***

- **Increased Inventory Performance**
- **Reduced Out-of-Stocks**
- **Increased Gross Margins**
- **Decreased Inventory Carrying Cost**

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## **Volume Building Programs**

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*Proper  
Space  
Management*

*Volume  
Building  
Programs*

**Profits**

*Proper  
Product  
Management*

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## **Volume Building Programs . . . Promotions Sell Product**

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### ***INCREMENTAL SALES COME FROM:***

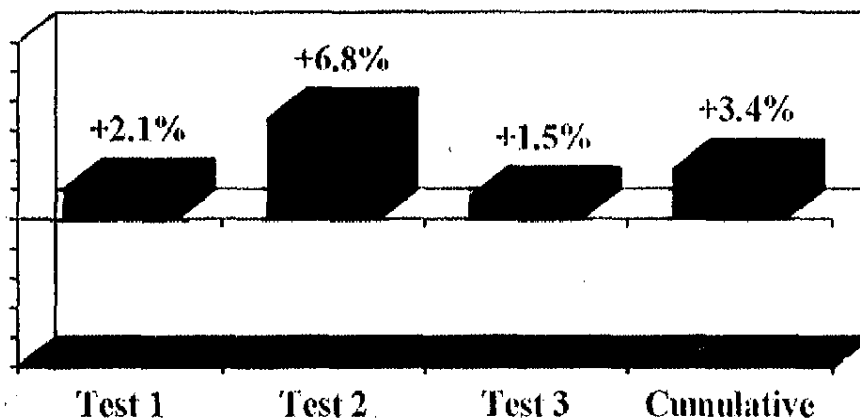
- **Programs that draw customers from other types of outlets**
- **Proper merchandising of all segment brand leaders**
- **Merchandising of growth brands**
- **Promotions that sell "EXTRA" product**

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## Volume Building Programs . . . Promotions Sell Product

### RJR Promotional Displays Total Category Sales Increases!!



- **40% of Total Industry Promotion Dollars - RJR**
  - Account Specific Promotional Activities
  - Promotions Targeted to Your Customers Lifestyle



## **Actions Necessary to Insure . . . The Benefits of Volume Building Programs**

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- ***Actions***

- **Promote Top Selling and Growth Brands in Each Segment**
- **Select Promotions Designed for Your Stores' Profile**
- **Only Promote those Brands that have the Potential to generate Incremental Sales**
- **Advertise Promotions**

- ***Benefits***

- **Increased Sales & Profits**

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**Category Expertise**

*Proper  
Space  
Management*

*Volume  
Building  
Programs*

**Profits**

*Proper  
Product  
Management*

*Category  
Expertise*

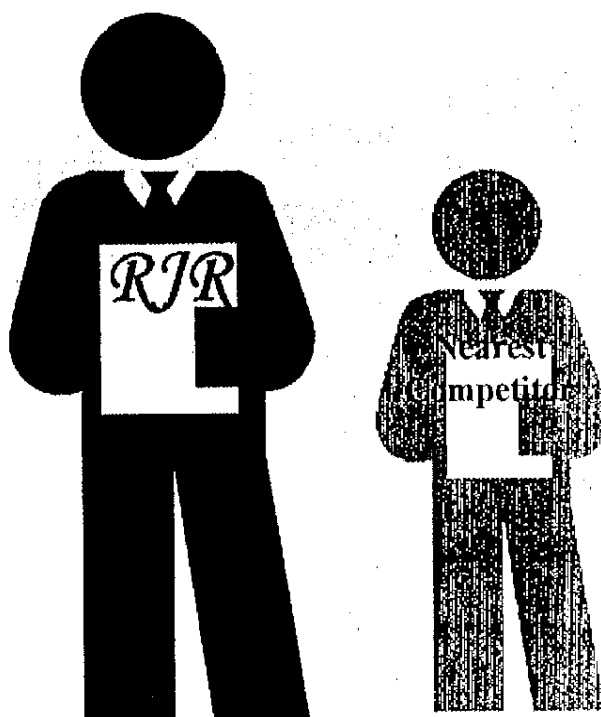
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**Category Expertise . . .**

**Service is the Key**



***RJR is Preferred !***

***Why Retailers Prefer RJR***

- Proven Leadership
- Powerful Merchandisers
- Responsive Field Team
- Flexible Programs
- Unmatched Commitment and Follow Through
- 1992 Supplier of the year (N.A.C.S.)

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## Category Expertise . . . RJR is Your Expert

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- *Sales Professionals*
- *Industry Initiatives*
- *Flexible Services*
  - Fixturing -- to -- Information
  - "Localized" Approaches
- *Promotional and Merchandising Planning*



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Convenience Stores

## **RJR is Your Category Management Expert**

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*Proper  
Space  
Management*

*Volume  
Building  
Programs*

# **Cigarette Profitability**

*Proper  
Product  
Management*

*Category  
Expertise*

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Industry Change

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Effective August 9th, 1993, A Major Change in the Cigarette Industry Occured

- Cost Reduction
- Spread Between Premium Price and Lowest Price Brands have Significantly Reduced (\$2.70 Cost Difference from Premium to Low Cost Brands)
- Consolidation of Cigarette Brands into 2 Price Tiers

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R.J. Reynolds Tobacco Company  
Cigarette Brands

Full Price Brands

CAMEL SPECIAL LIGHTS  
CAMEL SPECIAL LIGHTS BOX  
CAMEL SPECIAL LIGHTS 100  
CAMEL REGULAR  
CAMEL FILTERS  
CAMEL FILTERS BOX  
CAMEL FILTERS 100  
CAMEL LIGHTS  
CAMEL LIGHTS 100  
CAMEL LIGHTS BOX  
CAMEL ULTRA LIGHTS  
CAMEL ULTRA LIGHTS BOX  
CAMEL ULTRA LIGHTS BOX 100  
CAMEL WIDES FILTERS  
CAMEL WIDES LIGHTS

VANTAGE  
VANTAGE MENTHOL  
VANTAGE 100  
VANTAGE MENTHOL 100  
VANTAGE ULTRA LIGHTS  
VANTAGE ULTRA LIGHTS 100  
VANTAGE ULTRA LIGHTS BOX  
VANTAGE ULTRA LIGHTS BOX 100

CENTURY  
CENTURY 100  
CENTURY LIGHTS  
CENTURY LIGHTS 100  
CENTURY MENTHOL LIGHTS

NOW  
NOW MENTHOL  
NOW 100  
NOW MENTHOL 100  
NOW BOX  
NOW BOX 100

WINSTON  
WINSTON BOX  
WINSTON 100  
WINSTON LIGHTS  
WINSTON LIGHTS 100  
WINSTON LIGHTS BOX  
WINSTON LIGHTS BOX 100  
WINSTON ULTRA LIGHTS  
WINSTON ULTRA LIGHTS 100  
WINSTON ULTRA LIGHTS BOX  
WINSTON ULTRA LIGHTS BOX 100  
WINSTON SELECT KING  
WINSTON SELECT BOX  
WINSTON SELECT LTS  
WINSTON SELECT LTS BOX  
WINSTON SELECT LT 100  
WINSTON SELECT SLIM LT BOX

MORE 120  
MORE MENTHOL 120  
MORE LIGHTS 100  
MORE MENTHOL LIGHTS 100  
MORE LIGHTS 120  
MORE MENTHOL LIGHTS 120  
MORE WHITE LIGHTS 120  
MORE MENTHOL WHITE LTS. 120

SALEM  
SALEM 100  
SALEM LIGHTS  
SALEM LIGHTS 100  
SALEM LIGHTS 100 CUST. CASE  
SALEM SLIM LIGHTS BOX 100  
SALEM ULTRA LIGHTS  
SALEM ULTRA LIGHTS 100

## Branded Low Tier

DORAL FULL FLAVOR  
DORAL FULL FLAVOR 100  
DORAL FULL FLAVOR MENTHOL  
DORAL FULL FLAVOR MENTHOL 100  
DORAL LIGHTS  
DORAL LIGHTS 100  
DORAL MENTHOL LIGHTS  
DORAL MENTHOL LIGHTS 100  
DORAL ULTRA LIGHTS  
DORAL ULTRA LIGHTS 100  
DORAL NON-FILTERS

MAGNA FULL FLAVOR  
MAGNA FULL FLAVOR BOX  
MAGNA LIGHTS  
MAGNA LIGHTS BOX

STERLING FULL FLAVOR 100  
STERLING FULL FLVR. MEN. 100  
STERLING LIGHTS 100  
STERLING MEN. LIGHTS 100  
STERLING  
STERLING MENTHOL  
STERLING LIGHTS  
STERLING LIGHTS MENTHOL  
STERLING SLIM LIGHTS 100  
STERLING SLIM LTS. MEN. 100  
STERLING ULTRA LIGHTS 100  
STERLING ULTRA LIGHTS

BEST VALUE (11 STYLES)

MONARCH (11 STYLES)

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## Product Assortment

- Business was Rapidly Shifting to Savings
- Black and White Brands Showed the Largest Increase at the Expense of Branded Savings
- Declines in Full Price Business

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## Product Assortment

Both Price Tiers Should be Represented

- Full Price
- Low Tier

Each Tier Should be Properly

- Merchandised
- Displayed
- Advertised
- Priced

Next Steps

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Next Steps From This Point Into 1994  
Should Consider the Following

- Evaluate Current Merchandising Needs
- Evaluate the Number of SKU's Needed
- Evaluate the Number/Type of Display Needs
- Evaluate Pricing/Promotion/Advertising Needs



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## Merchandising Guidelines Key Objectives

- Maximize
  - Visibility
  - Accessibility
  - Availability

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## Merchandisers

### Package

#### Type

#### Location

Package Merchandiser

- Above Counter
- Behind Counter

Permanent Display

- Adjacent to Registers
- Primary Positions on Selling Counter
- Highly Visible NSS Behind Counter

Promotional Display

- Primary Counter (Permanent)
- Primary Floor Area (Temporary)

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Mobil Oil Corporation  
Merchandising

Capitalizing on Pack Sales

- Combine Package Promotion With Counter Program
- Increase Sales Through Multi Pack Purchases
- Capitalize on Trend Toward Package Sales
- Satisfy Consumer Desire for Increased Value

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## Merchandisers

### Carton

- Carton Merchandising Should be Visible

However, Carton Merchandisers Should only be used in  
Outlets with a Greater Percentage of Cigarette Sales by the  
Carton vs. Pack

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## Merchandising

### R.J. Reynolds Tobacco Company Mobil Oil Key Merchandising Factors Inventory Levels/Product Mix

- Strategies

- Maintain Distribution According to Location Needs

- Monitor Inventory

- Adjust According to Sales

- Improve ROI/Turns

- Tactics

- Ordering Procedures

- Demographic/Account Marketing

- .2 Share of Market

R.J. Reynolds Tobacco Company  
Mobil Oil Key Merchandising Factors

Display  
Strategies

- Utilize display Space to Maximize Exposure to Brands by Category
- Capitalize on Display Presence as a Promotional Vehicle

Tactics

- Display Load
- Promotional
- Future Design

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R.J. Reynolds Tobacco Company  
Mobil Oil Key Merchandising Factors

Pricing  
Strategies

- Remain Industry Leader in Savings Category
- Properly Position Brands in all Price Categories

Tactics

- Coupon Promotion Activity
- Promote Multi Pack
- Introduce New Brands

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R.J. Reynolds Tobacco Company  
Mobil Oil Key Merchandising Factors

Promotion  
Strategies

- Offer National/Regional Promotions to all Locations
- Develop Promotions Based on Opportunities/Local Leverage

Tactics

- RJR counter/Temporary Displays
- Area Manager DPC's

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R.J. Reynolds Tobacco Company  
Mobil Oil Key Merchandising Factors

Advertising  
Strategies

- Capitalize on RJR Advertising Available to Properly Communicate Business Building Opportunities
- Develop Unique Advertising Enhancing Mobil's Image While Growing Cigarette Category

Tactics

- POS Changeover
- 2 or 3 Pack Specials
- Back-Lighted Signage
- Other Opportunities

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Recommendations

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## Recommendations

- R. J. Reynolds Tobacco Company Display Contracts
- Pricing/Advertising/Promotion

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Mobil Oil Corporation  
R.J. Reynolds Tobacco Company  
Merchandising Contracts

- Permanent Counter Display
  - 2 Tier Premium display with 2 Tier Wrap for Doral with Illuminated Signage at #1 Cash Register
- Sterling/Magna/Monarch Display
  - Minimum of 2 Tier Display
  - Merchandised on Back Bar, Non Self Service, Highly Visible

**Payment:           \$65.00 per month**

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**Current Contract Payments**  
**Based on 2nd quarter 1993 Pay Register**

Total Corporate Stores on Contract: 446  
Total Projected Annual Payments: \$395, 688.00

**Proposed Contract Payments**

Total Corporate Stores: 634  
Total Projected Annual Payments: \$494, 520.00  
Increase: \$98, 832.00  
or 25% increase

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Mobil Oil Corporation

Mobil Oil Can Increase  
Their Cigarette Rebate Program  
With  
R.J. Reynolds Tobacco Company  
by Fully Participating in RJR Display Programs

- Recommendations Provide Ability for Implementing in all 634 Corporate Stores
- Consistent With Growth of Package Sales in Convenience Stores
- Can be Tailored to Mobil's In-Store Design
- Does Not Conflict with any Other In-Store Merchandising

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Promotion Strategy

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## Promotion Strategy

- Promotions Should be Based on Specific Consumer Needs Within a Market
- One Size may not Fit All
- Must be Displayed and Advertised

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## Promotion Strategy

- Do we Need a Permanent Platform for Promotions?

-Promotions will be Flighted

- As Discussed, The Number of Displays may be Reduced While Gaining/Maintaining Sales and Profits
- We may Promote from "Standard Counter Displays"
- Use of Temporary Displays for Flighted Premium Promotions?

## Promotion Strategy

- Identity Location for Temporary Promotions
- Multi Pack Promotions:

### Mobil, St. Louis -- Test Results

**\*\*RJR and Local Mobil Management Conducted a "Test" on a Shared Price Reduction Concept in 5 St. Louis Stores -**

**Below are the Results of that Test:**

#### # Stores -- 5

- Period: 4 Weeks, During January, 1993
- Promotion: 2 pack Winston at \$1.20 Price Reduction  
(RJR) 50 cent/Pack -- (Mobil) 10 cent/Pack
- Advertising: Pumptoppers and Banners at Store (Cost Share by RJR and Mobil)

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- Sales Results: 3, 072 Packs (1, 536 2 Pack Deals)
- + 54% Increase for Winston
- + 3.4% Overall Store Increase (Not Including Winston)
- RJR Chain Accounts Manager Ray Calderon Stated that Local Mobil Management was Very Impressed with the Results and They Would Suggest to Mobil Corporate Management that these Types of Programs Should be Pursued Nationally with RJR

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Sales Opportunities

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## Sales Opportunities

### Cigarette Category

- Low Cost Brands
- Multi pack Promotions
- Greatest Margins in Full Priced Business

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## Sales Opportunities

### Convenience/Gas Outlets

- Deli's
- Merchandising by Ethnic Group
- Brighter, More Open Stores
- Joint Ventures
- Scanning
- Debit Card
- Competitive Pricing

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## Sales Opportunities

### Mobil Mart's Most Significant Sales Opportunities

- Cigarette Promotion
- Savings Category
- Pricing Structure
- Knowledge of Category at Location Level

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## Mobil Oil Corporation

### Maximizing Cigarette Sales and Profits

- Critical Success Factors

- Know Your Business

- Know Your Customer

- Be Better than Your Competitor

- Remain Consistent

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**R. J. REYNOLDS TOBACCO COMPANY**

**ACCOUNT SPECIFIC MARKETING**

- **ELIMINATES ONE SIZE FITS ALL MENTALITY.**
- **EMPOWERS PEOPLE WHO KNOW OUR BUSINESS TO MAKE DECISIONS.**
- **GREATER INVOLVEMENT IN PLANNING, DESIGN, TIMING, AND IMPLEMENTATION.**
- **DECISIONS ARE BASED ON INDIVIDUAL STORE SALES, TRENDS, AND DEMOGRAPHICS.**
- **TOTAL FLEXIBILITY.**
- **WE WORK FOR SMOKERS.**

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**R. J. REYNOLDS TOBACCO COMPANY**

**ACCOUNT SPECIFIC MARKETING  
PROMOTIONAL SCHEDULE**

**OTHER FACTORS**

- **AMOUNTS OF PREMIUMS RJR CAN DELIVER**
- **COVERAGE/FREQUENCY OF ACCOUNTS**
- **RELATED POS**
- **WHOLESALE DISTRIBUTOR ASSIST PROGRAMS**
- **PACKAGING DESIGN/APPEARANCE**
- **GREATER VARIETY OF BRANDS THAT CAN BE PROMOTED**
- **NO CORPORATE DISPLAY LOADING GUIDELINES**

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**RETAIL STORE BRAND VOLUME MOVEMENT DATA**

TO: \_\_\_\_\_  
(Wholesale distributor)

**Authorization for release of chain/store brand volume movement data.**

To assist RJR in increasing sales and profitability of the cigarette category, the undersigned Retailer hereby authorizes you to provide R. J. Reynolds with the brand volume movement data, for all of retailer's stores, on an on-going basis.

This data is to be provided electronically on tape or diskette.

There will be no charge to Retailer for the run or release of this data.

Thank you for your cooperation,

RETAILER \_\_\_\_\_

AUTHORIZATION \_\_\_\_\_

TITLE \_\_\_\_\_

WHOLESALE ACCOUNT NUMBER \_\_\_\_\_

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Merchandising  
Conclusions

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## Mobil Oil Corporation

### Cigarette Merchandising Conclusions

- Capitalize on Package Sales
- Maximize
  - Visibility
  - Accessibility
  - Availability
- Realize Category is Being Driven by Price/Promotion
- Address Consumer Needs with Market Opportunities
- Increase Sales Through Multi Pack Purchases
- Promote/Merchandise Product Via Displays
  - Full Priced Brands (i.e. Winston)
  - Branded Low Tier (i.e. Doral/Monarch)
- Satisfy Consumer Desire for Increased Value
- Maintain Merchandising Displays Consistently

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**We Appreciate Your  
Business !**

**R.J. Reynolds  
Tobacco Company**

51856 0900

People/RJR Contracts

51856 0901



# **R. J. REYNOLDS TOBACCO COMPANY**

## **FIELD SALES STRUCTURE**

- o **MERCHANDISERS**
- o **SALES REPRESENTATIVES**
- o **AREA MANAGERS**
- o **SALES DIVISIONS**
- o **CHAIN ACCOUNTS DIVISIONS**
- o **REGIONS**
- o **AREA STAFF**
- o **HOME OFFICE STAFF**
- o **SALES AREAS**

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## MOBIL OIL CORPORATION

### Manufacturer Contract

Cigarettes

R. J. Reynolds Tobacco Company

Headquarters	Bill Roth	(703) 941-9538
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### Mobil District

#### Contact

#### Phone Number

#### Long Island

Suffolk	L. M. O'Connor	(516) 724-2061
Manhattan	A. J. Addressi	(212) 229-9166
Brooklyn	F. L. Maney	(718) 979-0601

#### New Jersey

Yonkers	L. S. Justo	(914) 592-1135
North Jersey	R. J. O'Rourke	(201) 575-9590
Central Jersey	J. H. Casey	(908) 225-3050
Newark	G. B. Brown	(908) 225-3550
South Central Jersey	J. A. Miller	(908) 972-1138

#### N. New England

Nashua, NH	J. C. Gresty	(603) 624-9300
N. Boston	T. J. Fitzin	(508) 435-6965
S. Boston	A. P. Scott	(508) 435-5393
New Bedford	J. L. Merusi	(508) 758-3663

#### West Chester, CT

Providence	M. A. Belniak	(401) 732-2121
Springfield	D. W. Keeney	(413) 733-3243
Hardford	G. R. Deschenes	(203) 298-8489
New Haven	G. M. Richardson	(203) 265-4947

#### Upstate New York

Syracuse	S. G. Steen	(315) 463-1971
Rochester	C. M. Uffindell	(716) 377-5050
Buffalo	D. T. Walsh	(716) 634-3212
Albany	T. J. Sullivan	(518) 452-4272

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**Mid-Atlantic**

Reading	P. J. Gilotty	(215) 926-1679
Philadelphia	F. V. Natale	(215) 359-1369
W. Philadelphia	R. R. Steele	(215) 353-8575
S. Philadelphia	D. L. James	(215) 359-1487
N. Philadelphia	R. L. Vansickle	(215) 659-8874
West Harrisburg	M. J. Hammond	(717) 761-0878
East Harrisburg	A. J. Tress	(717) 761-0878
Baltimore	D. M. Comer	(301) 931-4828
Alexandria	R. W. Brendel	(703) 471-4596

**South Atlantic**

Tampa	R. R. Shaw	(813) 885-4555
West Palm Beach	L. M. Pelton	(407) 795-4785
Miami	M. A. Quintero	(305) 594-8621
Sarasota	J. M. Birlin	(813) 378-2944
Ft. Lauderdale	E. E. Parker, Jr.	(305) 735-0140
N. Orlando	J. T. Johnson, Jr.	(407) 889-8338
S. Orlando	T. D. Haneline	(407) 889-8338
Daytona Beach	R. P. Stanley	(904) 274-1230

**Mid-West**

E. Chicago	B. N. Kelley	(708) 851-1515
S. Chicago	G. L. Pauling	(708) 339-5053
W. Chicago	Tyrone Higgs	(708) 350-2644
C. Chicago	Erling Hansen	(708) 851-1707
N. Chicago	J. R. King	(708) 541-0593
Milwaukee	M. L. Carroll	(414) 549-5311
C. St. Louis	A. D. James	(314) 391-8902
St. Louis	T. C. Peterson	(314) 391-7910
E. St. Louis	J. T. Fraser	(618) 624-4200

**Michigan**

E. Detroit	John Czerewko	(313) 377-0544
C. Detroit	W. J. Green	(313) 398-6390
W. Detroit	M. D. Hancz	(313) 462-3246
Lansing	D. M. Palmer	(517) 694-3306

**Los Angeles Basin**

N. Los Angeles	M. F. Serrano	(714) 994-3848
S. Los Angeles	C. V. Martonovich	(714) 777-6741
W. Los Angeles	Travis Moore	(310) 518-2283
San Gabriel	J. E. Stiltz	(714) 595-2229
Orange County	D. C. Myers	(714) 777-1040
N. Seattle	J. S. Alley	(206) 885-5426
S. Seattle	K. J. McClain	(206) 939-7170

Southern CA/Arizona

San Fernando Valley	J. G. Vierra	(805) 522-4331
Riverside	S. J. Tennant	(714) 735-2828
San Diego	G. A. Beas	(619) 560-5444
N. Phoenix	B. P. Ford	(602) 944-8393
S. Phoenix	E. T. Lenehan	(602) 944-1467

Texas

N. Dallas	H. D. Williams	(214) 644-5374
S. Dallas	T. J. Ramer	(214) 644-5373
N. Dallas Mid-Cities	J. M. Deener	(214) 437-5070
S. Dallas Mid-Cities	P. R. Merleno	(214) 437-5070
N. Ft. Worth	D. S. Gant	(817) 284-8088
S. Ft. Worth	J. K. Richardson	(817) 589-2627
W. Houston	C. M. Roberts	(713) 579-9899
E. Houston	D. W. Spradley	(713) 476-4686
N. Houston	P. J. Lamarca II	(713) 579-9897
Austin	R. R. Garlington	(512) 244-6605
San Antonio	L. D. Gann	(512) 696-7754